

ePROCUREMENT 8.8

SOURCE A REQUISITION ONTO A PO

This procedure takes the place of using the *Requisition Selection* page (**eProcurement | Buyer Center | Purchase Order Processes | Requisition Selection**).

Use this procedure to place a requisition onto either a new PO or an existing PO. When you use this method, requisitions instantly go to your PO (you do not have to wait 15 minutes for the ZP_PO_PR process to run). This procedure also eliminates problems with this process that are caused by using the *Requisition Selection* page.

You can, however, still use the *Requisition Selection* page to view requisition lines assigned to you that you do not want to immediately put onto a PO. You should no longer use the *Requisition Selection* page to source requisition lines onto POs as you did in the past.

Start by doing Step 1 **OR** Step 2. Then do Step 3.

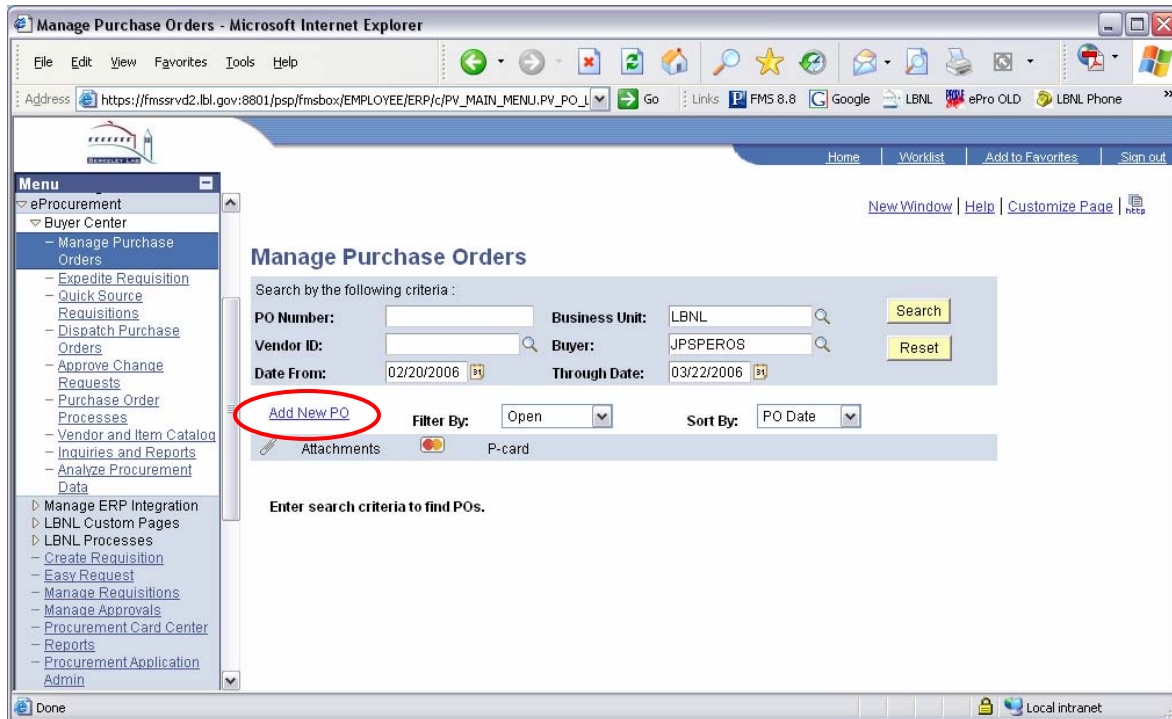
Step 1: Create a new PO and copy a requisition onto it (Page 1)

Step 2: Copy a requisition onto an existing PO (Page 3)

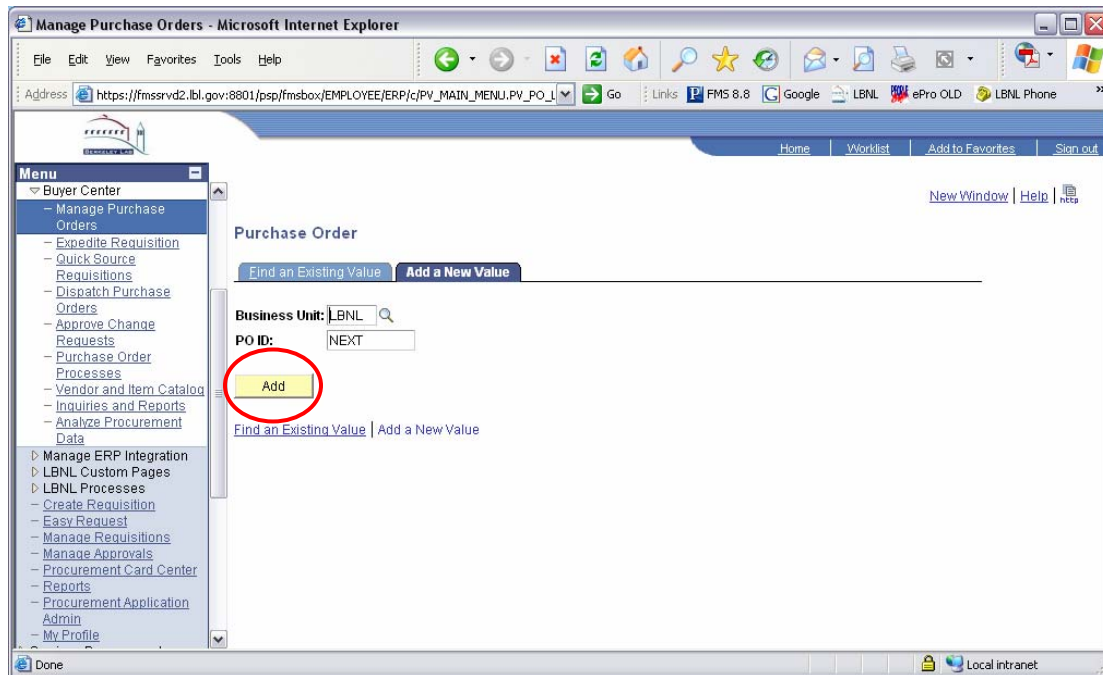
Step 3: Select Requisition to put onto the PO (Page 4)

Step 1: Create a new PO and copy a requisition onto it

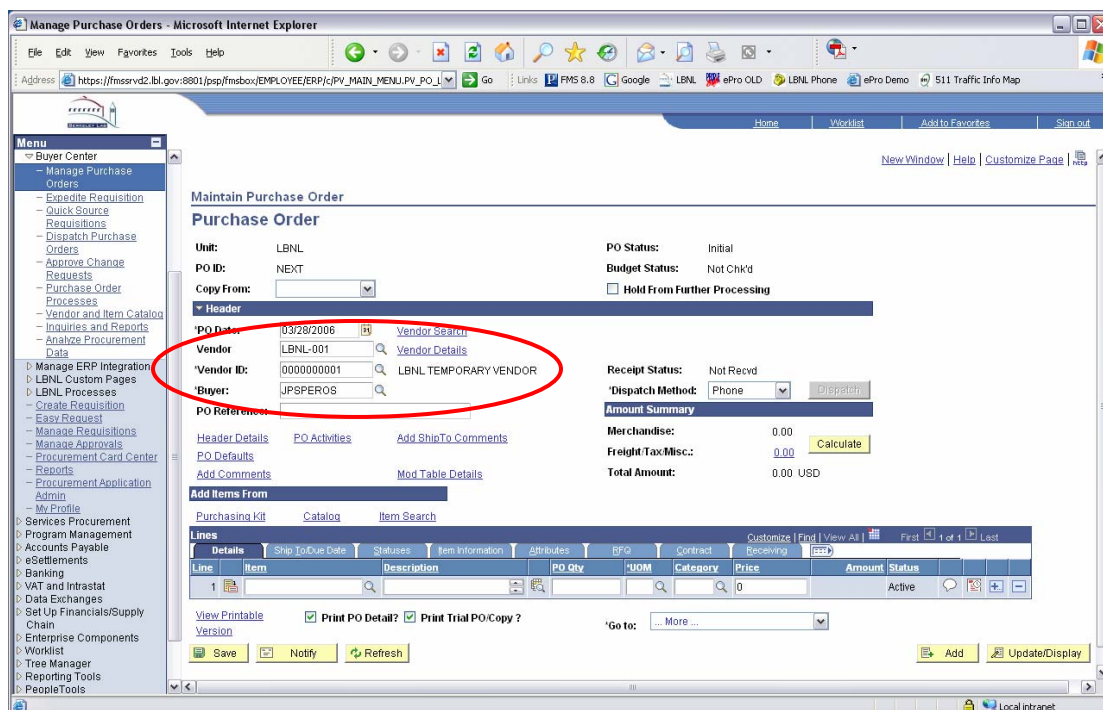
1. Navigate to **eProcurement | Buyer Center | Manage Purchase Orders**
2. Click on the **Add New PO** link



- Click the **Add** button to create a new empty PO. A regular PO is then displayed.



- Enter a **Vendor**: Click the magnifying glass (🔍) next to the Vendor box and select **LBNL-001** (LBNL Temporary Vendor) or search for the PO's final vendor, if you know it.
- Enter your **Buyer ID**.



GO TO STEP 3 (PAGE 4)

Step 2: Copy a requisition onto an existing PO

- Navigate to **eProcurement | Buyer Center | Manage Purchase Orders**
- Enter search criteria such as **PO Number**, **Date From**, and **Filter By** All.
- Click the **Search** button.
- Click on the **PO Number** you want to add the requisition to. The selected PO is displayed.

The screenshot shows the 'Manage Purchase Orders' web application in a Microsoft Internet Explorer browser. The address bar shows the URL: https://fmsrsvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PO_L. The page title is 'Manage Purchase Orders'. On the left is a 'Menu' sidebar with options like 'Buyer Center', 'Manage Purchase Orders', 'Expedite Requisition', etc. The main content area has a search section with fields for 'PO Number', 'Business Unit' (set to 'LBNL'), 'Vendor ID', 'Buyer' (set to 'LEGIBSON'), 'Date From' (set to '02/26/2005'), and 'Through Date' (set to '03/28/2006'). There are 'Search' and 'Reset' buttons. Below the search section is a 'List of Purchase Orders' table. The table has columns: PO Number, PO Date, Status, Buyer Name, Vendor, and Vendor Name. The table lists 10 purchase orders, all with a status of 'Dispatched' and a buyer of 'Gibson, Lorenza E'. The first PO number is 6803707, and the last is 6803255. At the bottom of the page, there is a 'Local intranet' icon.

PO Number	PO Date	Status	Buyer Name	Vendor	Vendor Name
6803707	11/11/2005	Dispatched	Gibson, Lorenza E	0000033244	PURE-001
6803697	11/10/2005	Open	Gibson, Lorenza E	0000009964	ESTES COMMERC
6803569	11/03/2005	Dispatched	Gibson, Lorenza E	0000031722	FIL-TECH-001
6803564	11/03/2005	Dispatched	Gibson, Lorenza E	0000002395	SEQUOIA ANALYT
6803384	10/21/2005	Dispatched	Gibson, Lorenza E	0000027476	AMERICAN-016
6803383	10/21/2005	Dispatched	Gibson, Lorenza E	0000033145	LABSUPPLIE-001
6803342	10/19/2005	Dispatched	Gibson, Lorenza E	0000029383	ADORAMA-001
6803292	10/17/2005	Dispatched	Gibson, Lorenza E	0000011377	CDW GOVERNMEN1
6803256	10/14/2005	Dispatched	Gibson, Lorenza E	0000032313	KST DATA-001
6803255	10/14/2005	Dispatched	Gibson, Lorenza E	0000032313	KST DATA-001

Hint: You can also search for an existing PO number if you click the [Add New PO](#) link, click the "Find an Existing Value" tab, enter a PO ID, and click the Search button. Here, you only need to enter a PO ID and do not need to enter other criteria. This method, however, does not show requisition attachments.

CONTINUE TO STEP 3 (NEXT PAGE)

Step 3: Select Requisition to put onto the PO

- Click the **Copy From** drop-down arrow and click on **Requisition**. You are then taken to a page that is similar to the *Requisition Selection* page.

Manage Purchase Orders - Microsoft Internet Explorer

Address: https://fmsrsvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/PPV_MAIN_MENU_PPV_PO_1

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Menu

- Buyer Center
 - Manage Purchase Orders
 - Expedite Requisition
 - Quick Source Requisitions
 - Dispatch Purchase Orders
 - Approve Change Requests
 - Purchase Order Processes
 - Vendor and Item Catalog
 - Inquiries and Reports
 - Analyze Procurement Data
- Manage ERP Integration
- LBNL Custom Pages
- LBNL Processes
 - Create Requisition
 - Easy Request
 - Manage Requisitions
 - Manage Approvals
 - Procurement Card Center
 - Reports
 - Procurement Application Admin
- My Profile
- Services Procurement
- Program Management
- Accounts Payable
- eSettlements
- Banking
- VAT and Intrastat
- Data Exchanges
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools

Maintain Purchase Order

Purchase Order

Unit: LBNL
PO ID: NEXT
Copy From: **Requisition**
PO Date:
Vendor: JPSPEROS
Vendor ID: 0000000001
Buyer: JPSPEROS
PO Reference:
PO Status: Initial
Budget Status: Not Chk'd
☐ Hold From Further Processing
Receipt Status: Not Recvd
Dispatch Method: Phone
Amount Summary
Merchandise: 0.00
Freight Tax Misc.: 0.00
Total Amount: 0.00 USD
Calculate
Header Details | PO Activities | Add ShipTo Comments
PO Defaults
Add Comments | Mod Table Details
Add Items From
Purchasing Kit | Catalog | Item Search
Lines
Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFO | Contract | Receiving | **See**
Line | Item | Description | PO Qty | UOM | Category | Price | Amount | Status
1 | | | | | | | | Active
View Printable
Version
☒ Print PO Detail? ☒ Print Trial PO/ Copy?
Go to: ... More ...
Save | Notify | Refresh | Add | Update/Display

- Click the **Search** button. A list of requisitions assigned to you will be displayed.
- Click the checkbox in the **Sel** column for each requisition line you want to copy to your PO. (You must manually click each requisition line, unlike the *Requisition Selection* screen.)
- Jot down the requisition's **Vendor Name** and **Vendor Location** number (if any). You will need to enter these onto the main PO page when you return to it in place of the LBNL-001 Temporary Vendor.
- Click the **Copy to PO** button to copy the selected requisition lines to the PO.

Manage Purchase Orders - Microsoft Internet Explorer

Address: https://fmsrvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PO_U

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Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit: LBNL Origin:

Buyer Name: JPSPEROS Speros, John P Max Rows: 50

Vendor ID:

Category:

Requisition ID:

Contract ID:

☒ Include Reqs With No Vendor

☒ Include Inventory Items

☐ Exclude Auto Source Item

Search

1 to 3 of 3

Select Requisition Lines

Sel	Vendor ID	Name	Vendor Location	PO Qty	PO UOM	Item	Description	Req ID	Line #	Schedule Split
<input checked="" type="checkbox"/>	000001861	ALAMEDA ELECTR	1	3.0000	EA		Threadz for the Labz	0000771628	1	
<input checked="" type="checkbox"/>	0000001861	ALAMEDA ELECTR	1	3.0000	EA		Shooz	0000771628	2	
<input type="checkbox"/>	0000025032	VWR INTERNATIO	1	50.0000	EA		stuff	0000771568	1	

☒ Select All [Clear All](#)

Copy To PO

Save **Notify** **Refresh**

Add **Update/Display**

Notes:

If you do not want to copy any lines to the PO, click the [Return to Main Page](#) link at the top.

By default, only 50 requisition lines are displayed. Increase the **Max Rows** number to see additional requisition lines.

There is currently no way to select all lines from a particular requisition. The [Select All](#) link will select all lines from all requisitions. This may be useful if the majority of lines you want to select are from one requisition. You must then uncheck the lines from requisitions you do not want.

- You are taken to the back to the *Maintain Purchase Order* page.
- Process the PO as you normally do. Update prices, shipping terms, ModTable, etc.,

For New POs	For Existing POs
Enter the Vendor that was on the requisition or enter a more appropriate vendor	
Click the Vendor Details link to enter the Vendor Location and payment terms.	
<ul style="list-style-type: none"> • Click the Approve (✓) icon • Click the Save button (A PO number will appear) 	<ul style="list-style-type: none"> • Click the Save button (the PO will change from <i>Dispatched</i> to <i>Open</i>) • Click the Approve (✓) icon • Click the Save button again

Manage Purchase Orders - Microsoft Internet Explorer

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- People Tools
- Change My Password
- My Personalizations

Maintain Purchase Order

Purchase Order

Unit: LBNL PO Status: Open
PO ID: NEXT Budget Status: Not Chk'd
Copy From: Hold From Further Processing

Header

PO Date: 03/28/2006 Vendor Search
Vendor: ALAMEDA ELECTRIC Vendor Details
Vendor ID: 0000001861 ALAMEDA ELECTRICAL DISTRIBUTORS IN Receipt Status: Not Recvd
Buyer: JPSPEROS Speros, John P Dispatch Method: Phone
PO Reference: Amount Summary

Header Details PO Activities Add ShipTo Comments
PO Defaults Edit Comments Mod Table Details

Amount Summary

Merchandise: 246.00
Freight/Tax/Misc.: 0.00
Total Amount: 246.00 USD

Add Items From

Purchasing Kit Catalog Item Search

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Amount	Status
1		Threadz for the Labz	3.0000	EA	CLOTH	50.00000	150.00	Active
2		Shooz	3.0000	EA	CLOTH	32.00000	96.00	Active

View Printable Print PO Detail? Print Trial PO/ Copy? Go to: More ...

Save Notify Refresh Add Update/Display